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Montana State Fund Guardian

September 1997

New Board Members Appointed

Effective July 1, two additional members were appointed to the State Fund Board of Directors by Governor Racicot as a result of Senate Bill 67—**Brian Donahue** of Billings and **Lorretta Lynde** of Helena. SB67 expanded the State Fund Board of Directors from five members to seven members to add more expertise. Brian Donahue, CPCU, is managing vice president of Hoiness LaBar Insurance Agency. His appointment fills the "licensed insurance agent" vacancy and will provide management and the Board with an experienced insurance professional. Lorretta Lynde is a third generation Montanan and owner of a management consulting business. Her extensive experience in human resources, marketing, and management will enable her to contribute an important perspective to the Board.

Is it a Producer's Policy?

By Jay Phillips

The State Fund has begun to issue policies through producers. The large account unit (Unit #5) in the Underwriting Department handles the initial contact with producers as follows:

Bernie Hewitt (Ext. 7779)
Seitz Insurance, Sidney
Montana Insurance Managers, various
Western States Insurance, Missoula & various
Steig & Associates, Billings & Missoula

Connie Ferriter (Ext. 1325)
Montana International Ins., Helena & Butte
First West Insurance, Bozeman
Insurance Service Partnership, Shelby
Dime Insurance Inc., Livingston

Suzie Shute (Ext 9783)
Glacier Ins., Libby
Talbot/Montana Glacier, Kalispell
Flynn Insurance, Great Falls
Cogswell Insurance, Great Falls

Dan Glenny (Ext. 6431)
Hoiness LaBar Ins., Billings
Terry Payne & Co., Missoula

Continued on Page 3.

Quality Customer Service

In our fast-paced and ever-changing industry, it's easy to lose track of the hours and minutes in the day. We develop ways to improve how we work so we can accomplish more. But in our quest to complete the added job duties and meet deadlines, we may overlook someone. Our customer.

Who is our customer? Anyone we provide service or information to--both internal and external. External customers are the reason we have a job. Internal customers help us do our jobs more efficiently and accurately.

How can we improve the service we give our customers?

1. Listen and provide accurate information with a positive attitude.

2. When you transfer a call, take the time to state what the call is about and introduce the caller to your co-worker.

3. Develop creative ideas and work processes and bring them to your supervisor's attention.

If everyone takes pride in their work and job success, the State Fund will be well on its way to being Montana's insurance carrier of choice and industry leader in service.

Published monthly by and for the employees of the Montana State Fund.

State Fund Golf Tournament

The second employee golf tournament was held on September 19 at Bill Roberts Golf Course. Four teams competed in the 18-hole scramble. Blaine Gilbert made the pressure shot of the day when he sunk a 30-foot eagle putt on the eighteenth hole to seal the victory for his team.

Results

Randy Marcus, Blaine Gilbert, Robin Pugh, and Dave Miller. **Score: 66**

Marvin Kraft, Tim Fitzpatrick, Dan Whyte, and John Thomas. **Score: 69**

Ben Jones, Bill Crivello, Brad Cozzie, and Mike Blades. **Score: 73**

Mike Wittrock, Barrie Nemetchek, John Linder, and Stacey Cummings. **Score: 81**

Safety Under the Big Sky

The Department of Labor and Industry's annual Governor's Conference on Workers' Compensation and Occupational Safety was held recently at Big Sky. A variety of speakers, including the State Fund's own Charlie Adams, appeared. Charlie spoke about recent workers' compensation decisions of the Montana Supreme Court. The conference covered a host of current claims, medical, legal, and safety issues.

Sixteen State Fund employees attended; they represented the Claim, Legal, and Underwriting Departments.

Training Calendar

Family & Medical Leave Act (FMLA) for Supervisors: Required. **Oct. 21**

FMLA for Employees: Increase your awareness of these benefits. **Oct. 21**

Quality Customer Service: Skills for effective public contact and first-class customer service. **Oct. 23-24**

Essentials of Management: Improves the supervisory skills of managers in government positions. **Oct. 28, Nov. 4, 12, 18, 25, Dec. 2, 4**

Getting to Know Underwriting: Oct. 29

Coping With Change: How to cope with personal and professional change. **Oct. 29**

Employee of the Month

Inez Slayman's co-workers say she is "courteous, kind, tolerant, cooperative, and dedicated." As a Document Indexing Clerk, her knowledge of claim documents is a great asset to the Imaging Unit. She answers her co-worker's questions and is always willing to help in all areas of the unit. Inez takes the initiative to educate those in other departments on how the imaging process works.

Congratulations, Inez, and thanks for all of your hard work!

Kudos Kolumn

Kudos to Kim Erickson

Policyholder Susan Mavor sent a letter thanking Kim for all of her help and stated, "I look long and hard for employees who show the kind of professionalism she gave to me. She's a real gem."

Kudos to Kelly Stanley

Ann Goetz, a policyholder recently wrote, "Kelly has been a breath of fresh air. She was patient, pleasant, and answered every question I had."

Kudos to Deanna Albert

Donna Fiscus with Pacific Machinery & Tools wrote about Deanna, "Deanna was so polite and helpful to all of my questions. You have found a true professional!"

Kudos to Sherry Carroll, Lorna Smith, Barb Holshue-Dudley, and Sandy Adams

"Each took one day to work at my station while I recovered from surgery. It's wonderful to have co-workers who help out when the need arises."—Betty Hicks

Kudos to the CSU

John Starner of Days Inn called to thank the CSU for being so helpful and friendly.

Kudos to Monica Carson and Lynn Mogstad

They both do a great job making customer service calls to cancelled policyholders. One recently stated he "was impressed the State Fund goes the extra mile to improve our service to current customers."

Kudos to Karen Wegner

"Whenever I receive a call from Karen she has already looked up the bill and understands the process. It helps a lot to have a CSU rep research the preliminary information. I appreciate her efforts!"—Kris Brandt

Continued from page 1.

Mark Karvelis, Market Development Manager, is also available to answer any questions.

State Fund policies issued through producers are specifically identified on DBO2. Screen #2210-the General Policy Information Screen-will show *** on the c/o line in the mailing address. This indicates the policy is handled by a producer. If a business name is listed on this line, the three stars will appear first, then the DBA (i.e. ***ABC Construction). If you inquire on screen #2225-Business and Cross-Reference Screen-you will see the agency name, producer, and location of the producer handling the account. The producer's address is listed on screen #2230-Certification of Coverage Screen-under the agency name.

One of five units in Policy Services will handle the policy after it is issued. If the group number begins with a 1, Unit 1 handles the account after enrollment. If the group number begins with a 2, Unit 2 handles the account, etc.

To assure the Claim Department is aware of a producer relationship on a claim, Policy Services will attach an FYI message to new claims. Policy Services will also put a message on the BIS notepad function as a permanent indicator of the producer relationship.

Human Resources

Personnel changes as of September 19, 1997

New Hires

Gary Martinez (Admin/Finance)
Randy Merrick (MIS)
Sheryl Semans (Admin/Finance)

Departures

Chip McKenna (Claim)

Giving Campaign Kicks Off

By Shawn Bubb and Debbie Allen

The FY98 State Employees Charitable Giving Campaign began on September 29. The events planned at the State Fund will provide a lot of opportunity for employees to participate in this worthwhile charitable event. Shawn Bubb is the agency coordinator this year. Plan to participate in the many fun events!

Committee members by floor:

Basement: Jean Ketchel, Loss Control; Jonny Samples, Loss Control; Stacy Ripple, MIS
First Floor: Betty Hicks, Claim; Lorna Smith, Claim
Second Floor: Debbie Allen, HR; Andy Anderson, CSU
Third Floor: Ann Clark, Legal; Vonnie Johnson, Underwriting

Schedule of Events

September 30: Executive Breakfast, 7-9am and extra casual day for $2
October 9: Drawing for a 1/2 day, guided fly fishing trip on the Missouri
October 22: Great Pumpkin giveaway. State Fund employees donate a pumpkin for Helena's Big Brothers and Sisters organization. The pumpkins will be carved by the Big and Little Brothers and Sisters as one of their special activities for Halloween.
October 2, 9, 16, and 23: 50/50 drawings
November 6: State Fund Bake Sale
November 7: Drawing for matted and framed Guardian of the Gulch print (available to view in Shawn Bubb's office until the drawing)

The Charitable Giving Campaign is an outstanding event that supports 255 different non-profit and charitable organizations. Help us make this year's campaign successful and fun!

Safety Expo '97

By Jean Ketchel

The State Fund Loss Control staff participated in the third annual Safety Day held on September 4 at the Capitol. Several displays promoted different aspects of safety, including defensive driving, fire safety, ergonomics, CPR/first aid, recreational safety, and disaster preparation.

Attendees examined a Blackhawk helicopter up close and watched as East Helena's fire and police departments demonstrated the Jaws of Life equipment. State and local officials, including Governor Racicot, modeled personal protective equipment in a safety fashion show.

The State Fund booth offered information on general safety and workers' compensation and showed a variety of safety videos.

Profiles

Policy Services

Back row, left to right: Deanna Albert, Lauree Kramer, Marilyn Murray, Terry St. Clair, Debbie Hunter

Front row, left to right: Linda Stockie, Valerie Ewals, Jay Phillips, Mary Simpson

Jay Phillips, Policy Services Supervisor, manages Units 1-4. These units handle approximately 14,000 accounts with an EAP of less than $10,000. Jay has been at the State Fund since September 1983. She says her biggest career milestone so far was "surviving my first public speaking presentation to 120 producers on June 3, 1997." Jay enjoys reading, camping, dirt bike riding, and gardening. She is growing a 100 lb. pumpkin for Halloween!

Mary Simpson has been an Underwriter Technician for six years. She assists with the management of Units 1-4 and reviews all new & re-enrollment applications. Mary also assists Units 1-4 with underwriting questions and issues. Mary enjoys her home life with her husband and son. Her hobbies include sewing and shopping for her granddaughter.

Unit 1

Lauree Kramer provides administrative support related to issuing new policies and maintaining current policies for Unit 1. Lauree came to the State Fund with an extensive background in the group health insurance area. She has also owned her own business. Lauree enjoys spending time with her three children, sewing, dancing at Roses, and mountain biking.

Underwriting Tech Assistant, **Valerie Ewals** has been a State Fund employee for 15 years. She provides information for prospective and current policyholders and updates accounts. Valerie job shares with Marilyn Murray and says, "It's wonderful to have a job you enjoy and still have time to spend with family and friends."

Terry St. Clair has been an Underwriting Assistant for nearly two years. She handles cancellations and re-instatements. Terry's previous work includes insurance and banking. She enjoys spending all of her free time with her children and grandchildren.

Deanna Albert, Underwriting Technician Assistant, provides underwriting services to policyholders. Deanna earned a degree in Business Administration from University of Montana. Her hobbies include reading and crossword puzzles.

Unit 3

Marilyn Murray job shares with Valerie Ewals as an Underwriting Tech Assistant. She started work at the State Fund in 1983 as the mail room supervisor. Marilyn says, "Working part time leaves me time to volunteer as a Girl Scout leader for my 10-year-old daughter's troop and at her school and our church. I spend my free time reading and cheering on the Bengals and Griz!"

Linda Stockie has been an Underwriting Assistant for twelve years. She answers customer questions, provides class code and rate information, and enrolls and cancels policies as needed. Linda has lived in Helena all her life and enjoys hiking, walking, visiting her son in Washington, and playing with her four grandchildren.

Debbie Hunter provides Underwriting Administrative Support for Unit 3. Her background includes a degree as a elementary teacher's aide and a paralegal degree. Debbie enjoys hiking, traveling, and reading mysteries.

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Managing Editor: Shannon Copps
Employee Reporters:
Kathy Rowsey Jean Ketchel
Charlie Adams Monica Carson
Jay Phillips

Please call 444-6502 with comments or suggested articles.

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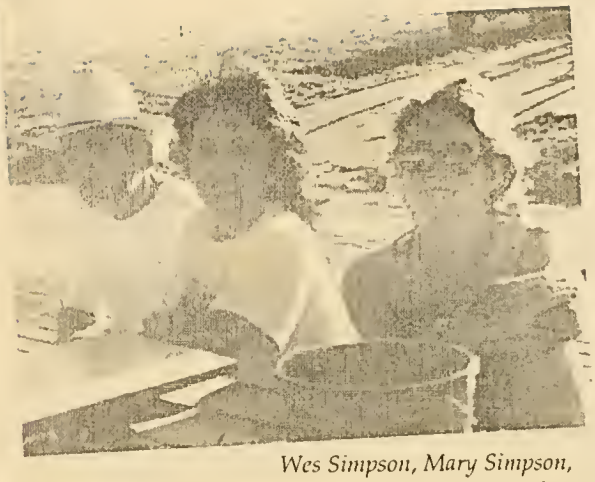
State Fund Summer Picnic

Employees and their families had a blast at the summer picnic held at No Wake Lake on August 30. Party-goers enjoyed a horseshoe tournament, waterskiing, music, games for the kids, and great food.

Thanks to the Special Activities Committee for all the time and effort it took to plan this fun event!

Wendy Lee, Lynn Mogstad, Kim Erickson, and Mark Karvelis.



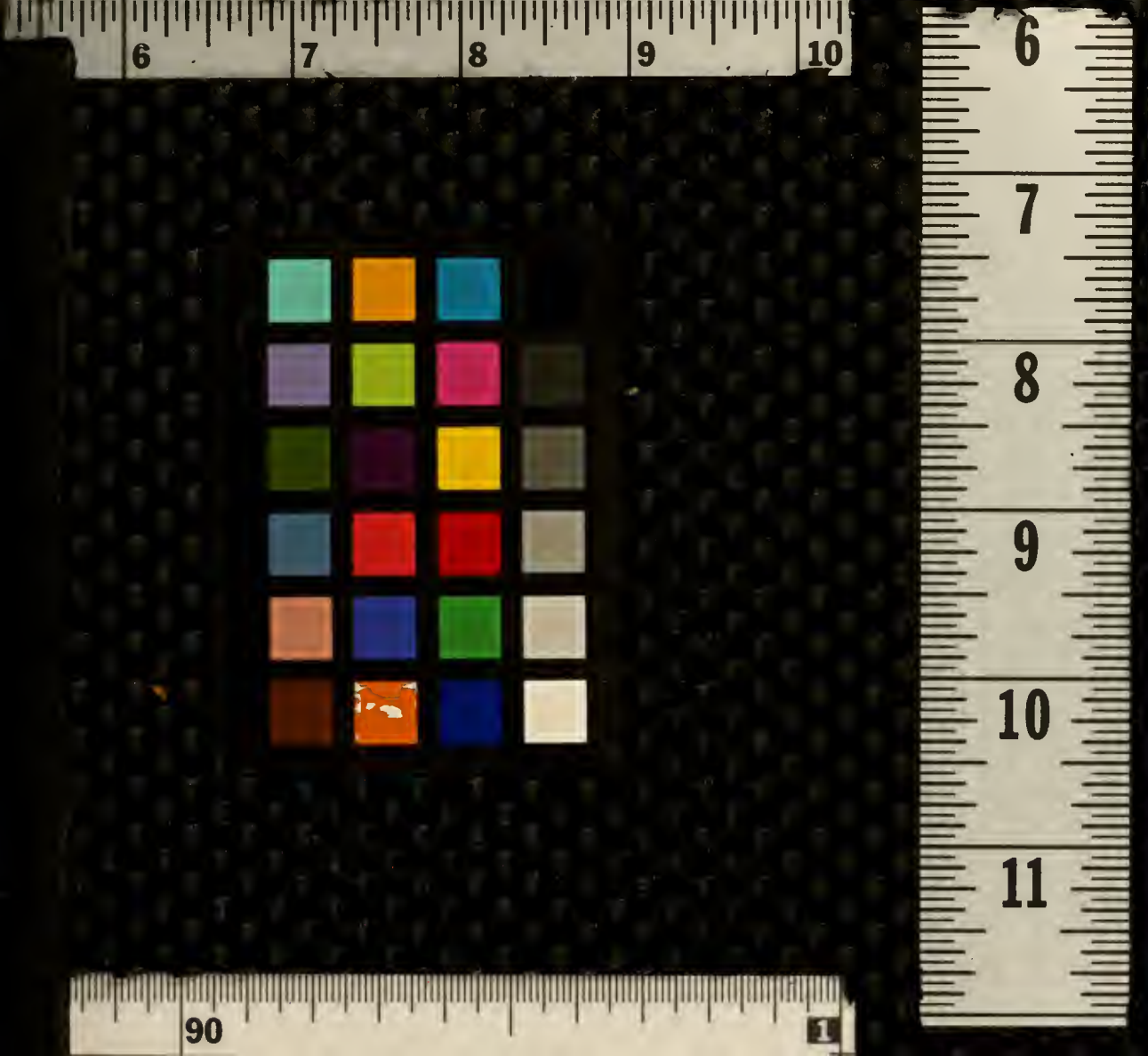
Wes Simpson, Mary Simpson, and Kelly Stanley.

Dwan Ford, Linda Goan, Kelly Stanley, and Carl Swanson enjoy conversation and sunshine.

Lauree Kramer appreciates Mike Blades' physique.

Linda Goan quenches her thirst while talking with Dwan Ford. The horseshoe tournament gets underway in the background.

Brett Collins and Sandy Leyva savor the moment as horseshoe tournament winners.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